

**HK TRUSTEES' ASSOCIATION LTD**  
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**A SEMINAR ON**

**AM I ABLE TO ACT? – CONFLICTS OF INTEREST IN THE PRIVATE TRUST  
CONTEXT?**

Speakers: Ms. Jacqueline Shek, Head of Legal for HSBC's Private Wealth Solutions business  
Ms. Joanna Caen, Senior Consultant of Private wealth team, Herbert Smith Freehills

Date: 27 February 2017

Time: 5:45 p.m. – 7:00 p.m.

Venue: Herbert Smith Freehills, 23<sup>rd</sup> Floor, Gloucester Tower, 15 Queen's Road Central, HK

This seminar will clarify and offer guidance on a difficult and much-debated area of trustee risk – conflicts of interest. Joanna Caen from Herbert Smith Freehills and Jacqueline Shek from HSBC will offer insight and practical tips on recognizing and understanding when and how conflicts arise in the private trusts context (whether between different trusts of which one trustee is trustee and/or between the trustee and a trust), how to prevent and manage conflicts and some of the consequences of failing to manage conflicts properly. This seminar is intended to be interactive and lively audience participation is encouraged.

Jacqueline Shek is the Head of Legal for HSBC's Private Wealth Solutions business. She is also a member on the Executive Committee of the Hong Kong Trustees' Association and a member of the Society of Trust and Estate Practitioners. Jacqueline is admitted as a solicitor of the High Court of Hong Kong and the Supreme Court of New South Wales, Australia. She is also a qualified Chartered Accountant, a Fellow of the Tax Institute of Hong Kong and a Fellow of the Tax Institute of Australia.

Joanna Caen is a Senior Consultant in the private wealth team at Herbert Smith Freehills. She is Head of Private Wealth – China. Joanna is admitted as a solicitor of the High Court of Hong Kong and as a barrister and solicitor of the High Court of New Zealand. Joanna has spent her entire career in private wealth law. She advises clients from various parts of the private wealth sphere (including individuals, private banks, trustee companies and other fiduciaries and advisers) on various private wealth issues. In keeping with the team's focus, her particular specialisms are trusts, estates, family companies, charities and, increasingly, mental capacity issues. She provides both non-contentious and contentious advice.

*This seminar is based on a breakout session at the STEP 2016 Hong Kong Conference presented by Jacqueline Shek, Richard Norridge and Eugene Fung SC. Jacqueline Shek is now pleased to re-run the seminar with Joanna Caen for HKTA members and guests.*

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**SEMINAR ENROLMENT FORM**

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The cost per person is HK\$300 for members of the HK Trustees' Association Ltd\* and  
STEP, and HK\$400 for non-members. (\*Any staff, not only the nominated representative  
of the HKTA member, can attend the seminar at a cost of \$300). Applications for ten or  
more members can enroll at a special discount fee of \$275 per person.

Please complete this form and return to us at the above address with your cheque made  
payable to "**HK TRUSTEES' ASSOCIATION LTD**".

Alternatively, please deposit to our account no. 447-0-024582-3 with Standard Chartered  
Bank and send us the receipt with this form by email.

Name of Member/Company \_\_\_\_\_

Name(s) of attendee(s) \_\_\_\_\_

Cheque total: \_\_\_\_\_ Cheque No. \_\_\_\_\_

Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

(NB: Payments are non-refundable unless the event is cancelled by the Association.  
Bookings are only confirmed with payment, on a first-come, first-served basis)